

From: Kyle Bentley
Director, City Development & CBO

Subject: Consulting Services for Phase 1 of the Comprehensive Zoning By-law Review
Request for Proposal No. RFP-7-2019
File: D-1100-101

Recommendation:

1. That the proposal submitted by WSP, dated November 6, 2019, to undertake the Comprehensive Zoning By-law Review in the amount of \$412,387.85 (including HST) be accepted;
 2. That the total gross project cost of \$145,606.00 (HST included), for Phase 1 of the Comprehensive Zoning By-law Review, including the total net project cost of \$131,123.00 (net of HST rebate), utilizing the funding identified for this project in the approved 2019 Current Budget for the City Comprehensive Zoning By-law Review (Account 2611.2392.0000), be approved;
 3. That Council authorize the Director, Finance & Treasurer to finance the Phase 1 net project cost in the amount of \$131,123.00 as follows:
 - a) The sum of \$32,500.00 as approved in the 2019 Current Budget – Planning & Design Cost Centre be increased to \$42,615.00 to be funded from property taxes;
 - b) The sum of \$67,500.00 as approved in the 2019 Current Budget – Planning & Design Cost Centre be increased to \$88,508.00 be funded by a transfer from the Development Charges – Studies Reserve Fund; and
 4. That the appropriate City of Pickering staff be authorized to enter into any agreements to give effect hereto.
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Executive Summary: In response to Report to Planning & Development Committee PLN 18-19, in which staff outlined the need to update and consolidate the City's zoning by-laws, City Council passed Resolution #109/19 endorsing the Work Program for a multi-year Comprehensive Zoning By-law Review (CZBR), authorizing staff to prepare and release a Request for Proposal to retain external planning consultants to assist with the completion of Phase 1, and to report back to Council on the recommendation of hiring a consultant.

A Request for Proposal (RFP) was issued on October 16, 2019, calling for proposals by consultants to undertake the multi-year CZBR, with the intention of determining the upset cost of the full study. An upset cost will assist staff in budgeting for the remainder of the CZBR.

The RFP closed on November 6, 2019, and received two proposals. The Evaluation Committee reviewed the proposals against the criteria outlined in the RFP and conducted an interview with the consultant achieving the highest score. The proposal from WSP received the overall highest ranking score best meeting the City’s requirements in completing project deliverables, considering their firm’s strengths relative to the scope of work required, and value for the money.

Staff is recommending that the firm of WSP be retained to undertake the multi-year CZBR. Due to funding changes as a result of the *More Homes, More Choice Act, 2019*, staff is recommending to proceed with Phase 1 of the project at this time. Phase 1 will be initiated in December 2019 and continue into 2020. Staff is also recommending that funding identified for this project in the approved 2019 Current Budget for the City Development Department be increased to finance the Phase 1 net project cost. Phase 1 includes the finalization of the public consultation strategy, preparation of discussion papers, hosting of open houses to present the findings of the discussion papers and obtain feedback from the community, and reporting to Council of the findings of the discussion papers and comments received from the public and stakeholders.

Staff will be recommending appropriate funds in the 2021 and 2022 Current Budgets for the City Development Department for the continuation and completion of Phases 2 and 3 of the CZBR in 2022 with the Council adoption of a new zoning by-law.

Financial Implications:

1. Estimated Phase 1 Project Costing Summary

Proposal No. RFP-7-2019	\$128,855.00
HST (13%)	<u>16,751.15</u>
Total Gross Project Costs	<u>\$145,606.15</u>
HST Rebate (11.24%)	(14,483.00)
Total Net Project Costs	<u>\$131,123.00</u>

2. Approved Source of Funds – Phase 1 (2019 Current Budget)

Account Code	Source of Funds	Budget	Required
2611.2392.0000	Development Charges Reserve Fund – Growth Related (67.5%)	\$67,500.00	\$67,500.00
	Property Taxes (32.5%)	\$32,500.00	\$32,500.00
Additional Funding Required			
	Development Charges Reserve Fund – Growth Related (67.5%)	0	\$21,008.00
	Property Taxes (32.5%)	0	\$10,115.00
Total Funds		\$100,000.00	\$131,123.00

Net Phase 1 Project Costs Over Approved Funds By	\$31,123.00
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As a result of the *More Homes, More Choice Act, 2019*, Development Charges Reserve Funds will not be available after 2020 for growth related studies. Staff will be recommending an appropriate new funding strategy in the 2021 and 2022 Current Budgets to complete Phases 2 and 3 of the CZBR.

1. Discussion:

1.1 Council passed a Resolution directing the initiation of a Comprehensive Zoning By-law Review

Lands in Pickering are regulated by 6 parent Zoning By-laws 2511, 2520, 3036, 3037, 7364/14 and 7553/17 (see Attachment #1, Areas for Parent Zoning By-laws). With the exception of Zoning By-laws 7364/14 (Seaton Urban Area) and 7553/17 (City Centre), the older parent by-laws were prepared under different jurisdictional context and policy framework pre-dating the City’s Official Plan. In addition, these older parent by-laws have been amended by numerous site specific zoning by-laws, and contain provisions that are dated, not reflecting current performance and development industry standards.

It is intended that official plans and zoning by-laws work together and that zoning by-laws be updated to implement the current official plan objectives and policies. Section 26(9) of the *Planning Act* requires official plans to be in conformity with the Provincial Policy Statement (PPS), and in 2016, the requirement was added that zoning by-laws be brought into conformity with the official plan within 3 years of an official plan update.

In June of this year, Report to Planning & Development Committee PLN 18-19 addressed the need to update and consolidate the City's zoning by-laws, and recommended that Council authorize staff to undertake a Comprehensive Zoning By-law Review (CZBR). Subsequently, Council passed Resolution #109/19 endorsing the Work Program for a multi-year CZBR, authorizing staff to prepare and release a Request for Proposal to retain external planning consultants to assist with the completion of Phase 1, and to report back to Council on the recommendation of hiring a consultant.

The primary purpose of the CZBR is to update and consolidate the City's current by-laws into one zoning by-law that conforms with and implements the City's Official Plan. A new by-law will implement recent policy changes regarding intensification, built-form, environmental matters and mapping changes. More specifically, the CZBR will:

- replace and remove outdated definitions and zoning provisions to provide for consistent interpretation,
- eliminate and amalgamate site specific zone provisions,
- make the zoning by-law available in an online and print accessible format, and
- allow the use of certain legislative tools such as the 'two year time out' provision of the *Planning Act* where amendments to City initiated zoning by-laws are prohibited two years following the adoption of a comprehensive zoning by-law.

1.2 A Request for Proposal (RFP) for Consulting Services for the Comprehensive Zoning Review was issued

On October 16, 2019, the City issued RFP-7-2019 for consulting services for the CZBR. The RFP called for proposals for the full multi-year study and not just for Phase 1 as referred to in Resolution #109/19. The intention of the RFP-7-2019 was to determine an upset cost for the full Study to assist staff in budgeting for the remaining Phases 2 and 3. The scope of the work (see Attachment #2, Scope of Work – Excerpt of Appendix D from RFP-7-2019) outlined the following 3 phases for the Study:

- Phase 1, which will be initiated in December 2019 and continue into 2020 includes the finalization of the public consultation strategy, preparation of discussion papers, hosting of open houses to present the findings of the discussion papers and obtain feedback from the community, and reporting to Council of the findings of the discussion papers and comments received from the public and stakeholders.
- Phase 2, which is proposed to be initiated in 2021 for completion in 2022 includes the preparation of the draft by-law, public consultation, revisions to the draft by-law, and preparation of a recommended by-law.
- Phase 3, which is the presentation to Planning & Development Committee of the recommended By-law for Council adoption in 2022 and includes addressing appeals to the CZBR, if applicable.

The RFP closed on November 6, 2019 with 2 proposals received.

1.3 Changes to Development Charges Funding

Consulting studies are funded according to a funding ratio involving Development Charges – Studies Reserve Fund and property taxes. As a result of the *More Homes, More Choice Act, 2019*, Development Charges Reserve Funds will not be available after 2020 for studies such as a CZBR. Staff is recommending to proceed with Phase 1 of the CZBR at this time. Phase 1 will be initiated in December 2019 and continue into 2020. Staff will be recommending an appropriate new funding strategy in the 2021 and 2022 Current Budgets to complete Phases 2 and 3 of the CZBR.

1.4 WSP is Recommended for Selection to Undertake the CZBR

The Evaluation Committee consisting of staff from City Development reviewed the proposals against the criteria outlined in the RFP. WSP was the consultant that received the highest score through the review process and was interviewed by staff (see Attachment #3, Memo from Supply & Services, dated November 19, 2019).

WSP has proven recent experience in preparing comprehensive zoning by-laws for municipalities in the Greater Toronto Area. The proposal by WSP identified a thorough understanding of the project. The WSP in-house team brings expertise in all required areas of community engagement, GIS analysis, urban design, zoning by-law preparation, project management, and planning policy needed to complete the Study.

2. Recommendations

It is recommended that WSP be retained to undertake the multi-year CZBR, and that the Director, Finance & Treasurer be authorized to increase the funding identified for this project in the approved 2019 Current Budget for the City Development Department to finance the Phase 1 net project cost. It is further recommended that staff be authorized to enter into any agreements as required to give effect to these recommendations.

Attachments:

1. Areas for Parent Zoning By-laws
 2. Scope of Work – Excerpt of Appendix D from RFP-7-2019
 3. Memo from Supply & Services, dated November 19, 2019
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Prepared By:

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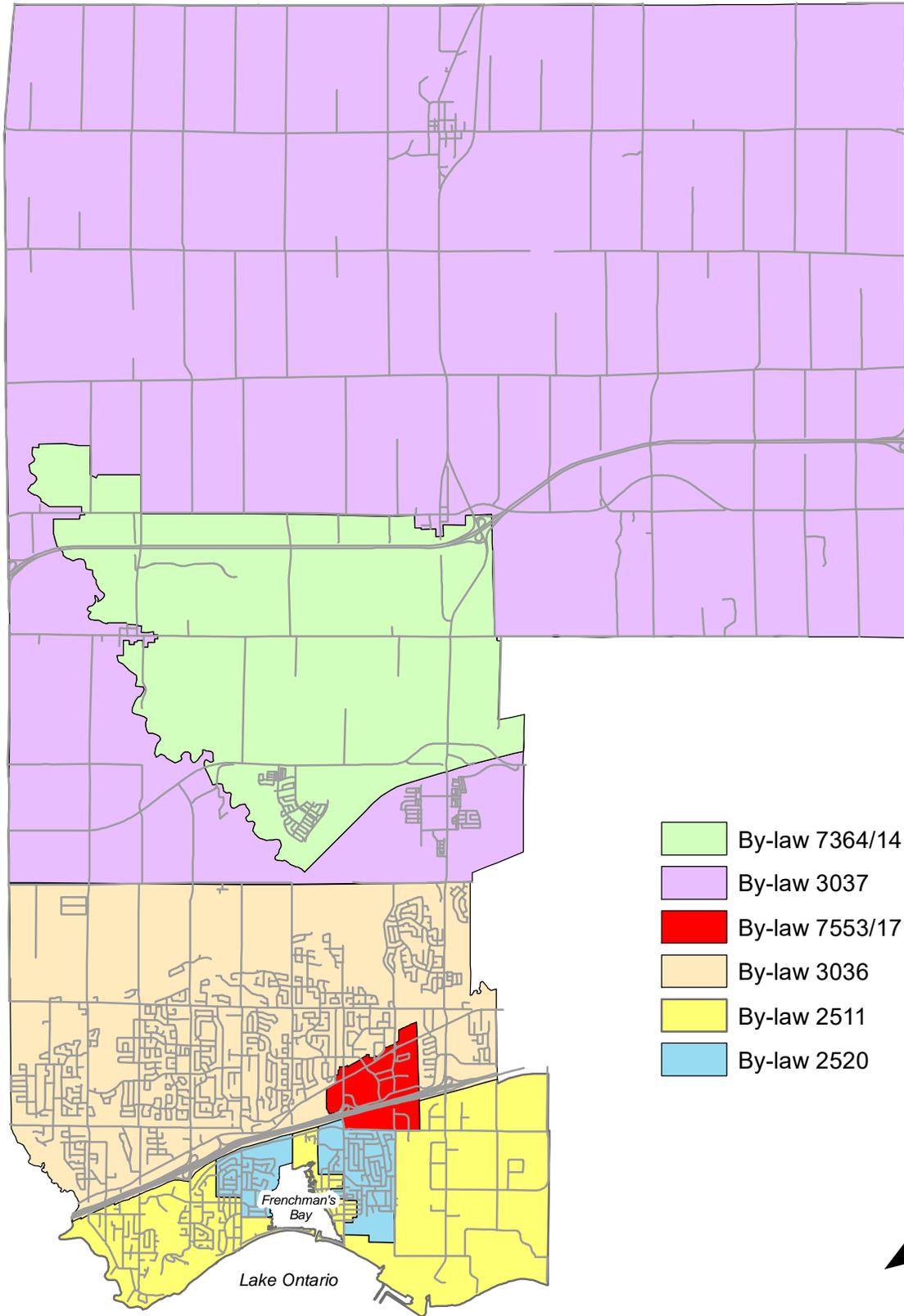
Stan Karwowski, CPA, CMA, MBA
Director, Finance & Treasurer

DW:ld

Recommended for the consideration
of Pickering City Council

Dec. 5, 2019

Tony Prevedel, P.Eng.
Chief Administrative Officer



- By-law 7364/14
- By-law 3037
- By-law 7553/17
- By-law 3036
- By-law 2511
- By-law 2520



City of
PICKERING
City Development
Department

Areas for Parent Zoning By-laws
(7364/14, 3037, 7553/17, 3036, 2511, & 2520)
Applicant: City Initiated

Date: Nov. 26, 2019

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SCALE: 1:100,000
THIS IS NOT A PLAN OF SURVEY.

Appendix D – Request for Proposals Particulars

A. The Deliverables

1. Purpose of the Request for Proposal

The City of Pickering (the “City”) is seeking proposals from qualified consulting firms to undertake a Comprehensive Zoning By-law Review (the “Study”). The purpose of the review is to:

- Consolidate the existing parent zoning by-laws and zoning by-law amendments into one comprehensive zoning by-law (the “By-law”) that conforms with the City’s Official Plan;
- Complete a detailed analysis of the City’s existing zoning provisions and update zone provisions to reflect development guidelines, and current development standards and approaches;
- Undertake any necessary background research to ensure the By-law is consistent with current legislation and policy; and
- Develop an accessible web based format for the By-law text and mapping, enhancing service delivery to City residents, businesses and the development community.

The Study will be conducted in three phases:

- Phase 1 will include the preparation of 9 discussion papers, finalization of the public consultation strategy, and hosting of open houses to present the findings of the discussion papers and obtain feedback from the community. This phase concludes with the reporting to Council of the findings of the discussion papers and comments received from the public and stakeholders.
- Phase 2 will include the preparation of the draft By-law, revisions to the By-law by staff, public consultation to obtain feedback on the By-law, further revisions to the draft By-law based on stakeholder/public input, and the preparation of a recommended By-law.
- Phase 3 will include presentation to Planning & Development Committee of the recommended By-law for Council adoption.

Should the City receive any appeals to the new Zoning By-law following Council adoption, assistance may be requested from the successful consulting team. An additional quote may be requested at a later date.

2. Background

Study Area

The study area comprises all of the City of Pickering, including the rural area and all of the urban neighbourhoods (see Attachment #1, Areas for Parent Zoning By-laws).

Planning Context

The City's Official Plan review has resulted in a series of amendments to the Official Plan implementing changes in legislation, updates to provincial plan and policy, and amendments to the Region of Durham Official Plan. Amendments to the Pickering Official Plan have included: a revised vision for the Duffin Heights Neighbourhood; new policies for the City Centre and intensification areas implementing the Provincial Growth Plan; updated Environment and Countryside policies; implementation of the Greenbelt Plan and the Central Pickering Development Plan (Seaton and the Agricultural Preserve); introduction of planning tools for Sustainable Placemaking resulting from changes to the *Planning Act*; and a general review of various policy tools.

The City is regulated by six parent Zoning By-laws 2511, 2520, 3036, 3037, 7364/14 and 7553/17. With the exception of Zoning By-laws 7364/14 (Seaton Urban Area) and 7553/17 (City Centre), the other parent by-laws were originally enacted by Council in the 1960's, and do not implement recent amendments to the Official Plan. These older parent by-laws were prepared under different jurisdictional context and policy framework pre-dating the City's Official Plan, and have been amended numerous times by site-specific by-laws and minor variance applications. Many of the provisions are dated and do not reflect current performance and development industry standards. The older by-laws require updating to implement the City's Official Plan, and to provide a strategic direction on a range of zoning issues.

3. Project Organization & Management

The Study will be conducted by the Company's Project Team (the "Project Team"). Staff and legal resources will be provided by the City to manage the Study, and to review the various reports and revisions to the draft By-law. A Project Manager assigned from City staff will manage the Study, and oversee a Project Leader assigned from the Project Team. A Project Steering Committee (the "Steering Committee") will provide strategic direction and will consist of representatives from various City departments. Responsibilities of the Project Manager, Project Team, Project Leader, and Steering Committee are outlined below.

3.1 The City's Project Manager

The Study will be led by the City Development Department who will assign a Project Manager to this Study. The Project Manager will be responsible for the supervision of the Study ensuring it is carried out to the satisfaction of the City in accordance with this request for proposal, and the Company's proposal. The Project Manager will monitor the progress of the Study, circulate reports for review and comment, liaise with the Company's Project Leader, and exercise budgetary control.

The Project Manager is to be:

- Kept informed through regular progress meetings with the Project Team and Steering Committee for the duration of the Study;
- Copied on all correspondence;

- Advised of significant problems, issues, options, and solutions considered;
- Involved in meetings with the public and stakeholders;
- Consulted prior to making any changes to the project schedule; and
- Advised of any additional work considered beyond the scope of work (additional work is not to be undertaken without prior written approval by the Project Manager).

3.2 The Company's Project Team

The Project Team shall have the necessary qualifications to undertake the scope of work and deliverables detailed in Section 4.

3.3 The Company's Project Leader

The Company will assign a Project Leader to make all day-to-day decisions, address requests for information, coordinate the Project Team's work, ensure the Study is within budget, and be responsible for all the deliverables outlined in this request for proposal.

The Project Leader will:

- Attend meetings with City staff, the public and stakeholders;
- Involve the Project Manager in any meetings with the public, agencies and stakeholders (all liaison with the public and stakeholders by the Company must be approved by the Project Manager);
- Prepare agenda, draft meeting notes, and final meeting notes for the Steering Committee meetings and progress meetings;
- Provide written responses to questions raised at meetings, as required (the Project Manager is to review and approve responses prior to responding to the public and stakeholders);
- Liaise and correspond with the Project Manager to obtain and communicate information related to the Study;
- Advise the Project Manager of significant problems/issues and options considered;
- Update the Project Manager on a monthly basis on details of the Study;
- Co-ordinate project tasks with any related task undertaken by the City;
- Prepare and submit reports, drawings and other documentation to the City and obtain comments, and approvals;
- Submit progress reports to the Project Manager at least five (5) days prior to any progress meeting;
- Prepare for, operate, and follow-up on open houses and other consultations including presentations/displays, and dry-runs;
- Record and prepare a summary of comments; and
- Receive the Project Manager's prior written approval for any significant change from the approved project schedule, budget or tasks.

3.4 Steering Committee

An internal Steering Committee, led by the Project Manager and comprising staff from City Development (Planning & Design, and Building Services), Engineering Services, Community Services, Corporate Services (Municipal Law Enforcement), and Office of the CAO (Economic Development & Strategic Projects) departments will provide strategic advice and direction. Steering Committee meetings will be held on an as needed basis and will be scheduled at the discretion of the Project Manager.

4. Scope of Work

The following sections provide an overview of the scope of the work to be completed. This is not intended to be an exhaustive list of the work activities. The Company may outline additional tasks, meetings, workshops or other activities necessary to achieve the objectives of the Study (see Section 7.3, Additional Activities). The Company will be responsible for providing all the necessary personnel, mapping and resources to complete the Study, and ensuring that every part of the study process is covered within the upset limit provided in the Company's proposal.

To facilitate the execution of the work by the Company, the City will provide the resources and materials identified in Section 7.5, Study Resources.

4.1 Phase 1 – Discussion Papers

The initial phase of the Study involves the preparation of a series of discussion papers focused on various topics that will inform the preparation of the new By-law. Attachment #2, Potential Topics for the Discussion Papers provides general details on the content of the discussion papers.

The potential topics for the discussion papers include:

- guiding principles & parameters
- review and assessment of existing parent by-laws
- residential zoning
- employment zoning
- mixed-use/intensification areas
- agricultural/rural/hamlet
- open space & environment
- parking/active transportation
- cannabis production

The following will be undertaken by the Project Team in Phase 1:

- attend the project kick-off meeting (introduction of team members, presentation of work plan, discussion of deliverables, review of community the consultation strategy)
- attend bi-monthly (one every two months) progress meetings (these meetings may be conducted by conference call)
- attend Steering Committee meetings as required

- background research and analysis into the areas of the discussion papers, including the review of:
 - the City's Official Plan and Development Guidelines, zoning by-laws, and minor variances
 - City initiatives, engineering standards, relevant studies, and staff reports
 - relevant provincial plans and policies
 - key issues, trends, and assumptions
 - various recent development applications, and building permits
- prepare discussion papers
- finalize the public consultation strategy supporting the scope of work
- conduct public and stakeholder consultation to obtain comments and present findings:
 - a minimum of 5 community consultation sessions in appropriate formats (i.e., open houses, information sessions, workshops, roundtables)
 - at the public consultation, the Company will describe the purpose and objectives of the Study; provide an analysis of the existing zoning issues; provide a summary of each discussion paper; and summarize what the implications are for the draft By-law
- compile, summarize and include responses for comments received
- present the draft discussion papers to Planning & Development Committee and Council

The City will be responsible for preparation and circulation of public notices for the public/stakeholder consultation meetings. Additional consultations with specific stakeholders may be identified through the course of the Study.

Phase 1 Deliverables

The Company will provide draft and final reports, conduct public consultations, compile comments received, present to Planning & Development Committee, and participate in meetings as outlined below:

Discussion Papers

- first draft and second draft (10 bound hard copies) including an electronic version for review and comment by the Project Manager and Steering Committee
- final report (10 bound hard copies) including an electronic version for public and stakeholder consultation

Public Consultation Strategy

- final public consultation strategy (3 bound hard copies) including an electronic version
- a minimum of 5 consultation sessions in appropriate formats (the Project Team will be responsible for preparation, operation and follow-up on open houses and other consultations, including presentations/displays, dry-runs, set-ups, attendance, and compilation of comments)

Management of Comments

- generate and update a document summarizing public and agency comments received, recommendations, and action taken/comment

Presentation to Planning & Development Committee

- presentation of the findings of the discussion papers to Planning & Development Committee

Administration

- preparation of progress reports, meeting agendas, and meeting notes for the progress meetings and Steering Committee meetings

City staff will prepare a covering information report to Planning & Development Committee for the discussion papers.

4.2 Phase 2 – Draft Comprehensive Zoning By-law

Based on the work completed in Phase 1, the Project Team will draft a By-law for review and comment by stakeholders and the public. Public consultation will be facilitated by the Project Team and will be initiated once the draft By-law is written, reviewed and revised to the satisfaction of the City. All facilitation material will be discussed with and approved by City staff prior to finalization. Following the review of all submissions from stakeholders and the public, the Project Team will prepare revised drafts for review and comment by the City. The Company's lump sum price on Table 1 of the Pricing Form, must include the costs for the preparation of a minimum of 3 draft By-laws and a recommended By-law. The Project Team is responsible for making all revisions to the draft By-laws, to the satisfaction of the City. The Project Team will also be responsible for recording and summarizing the comments received, and providing recommendations along with how the comments will be addressed. Any responses to comments must be reviewed and approved by the City. Additional public consultations may be required.

Phase 2 Deliverables

The Project Team will provide an initial draft By-law, revised drafts including a recommended By-law, conduct consultations, and present and attend Open Houses/Statutory Public Meetings as outlined below. The Company shall assume that each version of the draft by-law will undergo at least 1 review by the City and revision by the Project Team prior to public release.

Draft By-laws

- first draft By-law (10 bound hard copies) including an electronic version for review and comment by the Project Manager and Steering Committee

- second draft By-law (10 bound hard copies) including an electronic version for stakeholder and public consultation
- third draft By-law (10 bound hard copies) including an electronic version for stakeholder and public consultation
- recommended By-law (10 bound hard copies) including an electronic version

Public Consultation

- minimum of 3 consultation sessions in appropriate formats (the Project Team will be responsible for preparation, operation and follow-up on open houses and other consultations, including presentations/displays, dry-runs, set-ups, attendance, and compilation of comments)

Management of Comments

- continue completion of document summarizing public and agency comments received, recommendations, and action taken/comment

Open Houses/Statutory Public Meeting

- prepare and deliver presentation(s) to a minimum of 3 Open Houses/Statutory Public Meetings

Administration

- preparation of progress reports, meeting agendas, and meeting notes for the progress meetings and Steering Committee meetings

4.3 Phase 3 – Council Adoption

The City will prepare a recommendation report to Planning & Development Committee for consideration of the recommended By-law and adoption by Council. The Project Team will be responsible for attending the meeting, presenting, and answering questions.

Phase 3 Deliverables

The Company will present the recommended By-law and summarize comments received as outlined below:

Planning & Development Committee Meeting

- attend, answer questions and present the recommended By-law

Management of Comments

- complete document summarizing public and agency comments received, recommendations, and action taken/comment

5. Consultation

Initiating a dialogue with the public and stakeholders, and facilitating participation in the process is key to achieving broad support in the development and successful implementation of the new By-law. A strong emphasis placed on consultation in this Study.

As such, the Project Team shall prepare, and include in their proposal, a consultation strategy that demonstrates how they propose to obtain early input from the public in an effort to advance the resolution of issues, and identify concerns requiring further research.

Over the course of the Study, the Project Team will facilitate public consultation, host open houses, present the draft discussion papers and draft By-law to Planning & Development Committee and Council, and present the recommended By-law to Planning & Development Committee. The City shall be responsible for the preparation and circulation of public notices for public/stakeholder consultation meetings and public meetings. Additional consultations with specific stakeholders may be required.

The Project Team will be responsible for the following:

- facilitation, presentation and subject matter expertise at public and stakeholder meetings, including the preparation and delivery of any presentations, preparation and printing of handout material and/or display boards, and, staffing for public consultation sessions;
- presentation and subject matter expertise at meetings of the Planning & Development Committee and Council; including the preparation and delivery of any presentations, display boards, and consolidation/summary of comments;
- creation and maintenance of a public consultation file, including a matrix documenting public and stakeholder comments with the Project Team and City staff responses;
- preparation of agenda, draft meeting notes, and final meeting notes for the progress meetings and Steering Committee meetings;
- advice/input on consultation proposed by The City, such as media releases and newspaper ads, social media advertisements, website page, brochures, etc; and,
- recommended approach for consultation (and form of consultation) with specific stakeholders that may be warranted or appropriate to seek input on specific topics.

The Project Manager will be responsible for the following:

- establishment and updating of a study page on the City's website to facilitate communication with the public;
- creation and maintenance of a database of public, stakeholder and agency contacts;
- posting of social media messaging;
- booking of venues and audio visual equipment, and provision of refreshments (as warranted) for all public and stakeholder meetings;
- circulation of any study documents/deliverables; and

- preparation and circulation of public notices in the local newspaper, mail, email, on the City's website, etc.

All external consultation elements will require pre-approval by the Project Manager and are subject to participation by the City. The consultation strategy proposed by the Company shall comply with *Municipal Freedom of Information and Protection of Privacy Act* requirements.

6. Considerations

6.1 AODA Compliance and City of Pickering Brand Guidelines

Studies, reports, plans and presentations that will be published on the City of Pickering website must be provided to the City in an accessible format compatible to Adobe Acrobat XI or higher.

Companies performing the work for the City must comply with the *Accessibility for Ontarians With Disabilities Act, 2005* ("AODA"), in particular the Integrated Accessibility Standards, O. Reg. 191/11.

Unless determined by the City to not be practicable, Companies shall ensure that any information, products, deliverables and/or communications (as defined in the Integrated Regulation) produced pursuant to a contract shall be in conformity with World Wide Web Consortium Web Content Accessibility Guidelines (WCAG) 2.0 Level AA and shall be provided in accessible Word, Excel, PowerPoint, PDF, etc. Visit Ontario.ca for rules on how to comply.

Materials produced must comply with the City's Creating Accessible Documents Procedure.

All documents and products produced by the Company that will be released to the public (electronic and hard copy) must also comply with the City's Brand Guidelines. This includes PowerPoint presentations, reports, newsletters, brochures and any other handout material.

6.2 Submission of Electronic Documents

All electronic documents produced by the Project Team during the course of the study and at the conclusion of it will be compatible with the City's Information Technology systems and software. At the conclusion of the Study, the Company will compile and submit to the City all electronic files corresponding, but not limited to, the following:

- letters and communications, memorandums, meeting minutes and agendas in Microsoft Word 2016
- background and technical documents in Microsoft Word or Excel, as applicable
- study report(s) and appendices, including draft By-laws in the following formats, as applicable:
 - Microsoft Word 2016
 - Adobe InDesign

- PDF (compatible with Acrobat Pro Version 2019.010.20091)
- GIS and AutoCAD (Map 3D 2018) files in the following format:
 - GIS shapefile georeferenced to NAD_1983_UTM_Zone_17N
 - WKID: 26917 Authority: EPSG
- sketches, drawings, illustrations and graphics in the following, as applicable:
 - AutoCAD (map 3D 2018) georeferenced to NAD_1983_UTM_Zone_17N
 - Corel Draw (X8)
 - Adobe Illustrator

6.3 Meetings and Presentations

The following lists the type and minimum number of meetings that are to be included in the proposal:

Meeting	Minimum Number
Start-up Meeting	1
Bi-Monthly Progress Meetings/Conference Calls	15
Steering Committee Meetings	6
Consultation Sessions	12
Open Houses/Statutory Public Meetings at Planning & Development Committee	3
Planning & Development Committee for Recommended By-law	1

Additional meetings may be required over the course of the Study. These meetings will be identified by the Project Manager during the course of the Study.

7. Project Schedule and Management

7.1 Administrative Matters

- No material, data or information pertaining to the Study is to be released to any individual, group, organization or agency, without the prior express written consent of the Project Manager.
- All originals of reports, supporting documentation and presentation materials will be provided to the Project Manager upon completion of each project phase.
- All reports, supporting documentation and presentation materials will be in a form and quality acceptable for reproduction and presentation as described above and shall be acceptable to the Project Manager.
- All material will become the intellectual property of the City.

7.2 Study Schedule

The Study is expected to take approximately thirty (30) months with an award and start-up meeting between the Project Team and Project Manager prior to December 31, 2019. Proponents shall submit a work plan, in the form of a Gantt Chart (or other similar illustration), for all portions of the contract in accordance with the estimated timeline below. The work plan must contain detailed descriptions of all tasks to be performed, staff responsible for each task, key milestones and activities for completing the work. Proponents may propose alternative milestone events and/or dates, provided that the proposed overall duration does not exceed thirty (30) months.

	Expected Date
Award Contract	December 2019
Phase 1 – Discussion Papers	
Start-up Meeting	December 2019
Finalized Public Consultation Strategy	February 2020
Discussion Papers/On-going Consultation	March 2021
Report to Council	June 2021
Phase 2 – Draft By-law	
Consultation	Ongoing
First Draft By-law	September 2021
Open House/Public Meeting & Information Report	November 2021
Second Draft By-law	December 2021
Open House/Statutory Public Meeting(s) & Information Report(s)	If required
Third Draft By-law	February 2022
Open House/Statutory Public Meeting(s) & Information Report(s)	If required
Recommended By-law	April 2022
Phase 3 – Adoption	
Council Adoption	June 2022
Appeals to LPAT	If applicable

7.3 Additional Activities

Should Proponents outline additional tasks, meetings, workshops or other activities necessary to achieve the objectives of the Study, those activities with their expected benefits shall be detailed in their submission. Costs indicating hourly rates for additional activities shall be indicated in Pricing Tables #2 and #3, Appendix C – Pricing Form.

The Company will attend an in-person or conference call meeting with representatives of the City of Pickering at a minimum once a month to discuss work completed per task. In addition to the meeting once a month, please provide the costs for an additional meeting.

7.4 Study Initiation

Following Award and prior to the commencement of any work, the Project Team shall meet with the Project Manager to complete the following tasks:

- Confirm the extent of services, work program, study schedule, communication and public engagement strategy, and all other relevant detail as outlined in the proposal;
- Establish contacts and procedures for communication between the Company and the City; and
- Make arrangements to acquire background information and data from the City.

7.5 Study Resources

The City will, upon request, make a variety of documents and data available to the Company. In certain circumstances, the Company may need to enter into an agreement with the City or other public body to access or use certain data sets. The study resources include:

City of Pickering

- City of Pickering Official Plan (Edition 8)
- City of Pickering Official Plan Compendium Documents
- City of Pickering Zoning By-law 3036
- City of Pickering Zoning By-law 3037
- City of Pickering Zoning By-law 2511
- City of Pickering Zoning By-law 2520
- Seaton Zoning By-law 7364/14
- City Centre Zoning By-law 7553/17
- City of Pickering Site Plan Review Manual
- City of Pickering Draft Plan of Subdivision Processing Manual
- City of Pickering Minor Variance Application Process
- City of Pickering Engineering Services Design Criteria
- City of Pickering Integrated Transportation Master Plan (in progress)
- City of Pickering Cultural Strategic Plan
- City of Pickering Community Profile

- City of Pickering Municipal Heritage Register
- Pickering Demographics & Statistics
- City of Pickering Sustainable Development Guidelines and Scorecard for Neighbourhood Sustainability
- City of Pickering Brand Guidelines

Pickering Public Library

- Pickering Local History Collection Digital Archive

Region of Durham

- Durham Region Official Plan, Consolidation 2017

B. Material Disclosures

The material disclosures that apply to this Request for Proposals, if any, are set out below.

Not applicable for this Proposal.

The pre-conditions of award that apply to this Request for Proposals, if any, are set out below.

1. The Proponent agrees to provide to the City for review after closing

- a) A copy of the City's Health & Safety form (currently dated and signed);
- b) A certificate of insurance completed by the Company's agent, broker or insurer (City form is attached); and
- c) Such further information as the City may require, as requested in writing.

Items (a) and (b) do not have to be submitted with the proposal. Documentation (a) and (b) shall be provided within **three (3) business days** of written request by the City.

The City's findings shall be used to serve the best interests of the Corporation of the City of Pickering.

2. Supplementary Documents

Subsequent to the Request for Proposal opening and upon request, the following documentation may be requested by the City for approval at any time throughout the duration of the project:

- a) A completed Accessibility Regulations for Contracted Services form;
- b) A completed Sub-contractors List, listing all sub-contractors who may be carrying out any part of this Contract; and
- c) Such further information, as the City may request in writing.

Documentation shall be provided within **three (3) business days** of written request by the City.

The City's findings shall be used to serve the best interests of the Corporation of the City of Pickering.

C. Mandatory Technical Requirements

The mandatory technical requirements that apply to this Request for Proposals, if any, are set out below.

Not applicable for this Proposal.

D. Rated Criteria

The following is an overview of the categories and weighting for the rated criteria of the Request for Proposals. Proponents who do not meet a minimum threshold score for a category will not proceed to the next stage of the evaluation process.

Rated Criteria Category	Weighting (Points)	Threshold
Proponent's Experience and Qualifications	20	
Understanding of Project	15	
Work Plan and Deliverables	25	
Project Leader, Project Team and Resources	25	
Quality of References	Pass/Fail	
Total Rated Criteria Points	85	51
Pricing	15	
Total Points	100	
Presentation (Up to 3 Proponents, if required)	25	
Total Points (if interview required)	125	

Proponent's Experience and Qualifications = 20 Points

- a) Provide a company profile and three relevant examples of current/past projects within the last five years that are comparable in scope. This should include a project synopsis that identifies the team members assembled who worked on the project, the current project status, budgeted costs versus actual costs, scheduling issues and resolutions, and design challenges or efficiencies. Provide client names, contacts and up-to-date contact phone numbers;
- b) A description demonstrating the Proponent's substantial resources and support services available; and
- c) A description of the Proponent's proven methodology for communicating information to the applicable stakeholders.

Understanding of Project = 15 Points

The Proposal should include information that provides:

- a) Information that the Proponent understands the objectives and requirements of this project. Proponents must relate these objectives to past experience or expertise of the Proponent and/or their team; and
- b) A summary of the risks, problems or issues associated with the work and how they will be mitigated.

Work Plan and Deliverables = 25 Points

The Proponent is to provide a written response which clearly and concisely details the following:

- a) An indication of when the Proponent can commence the work;
- b) A draft public consultation strategy outlining the methods to engage and communicate with the public;
- c) A detailed work plan indicating and detailing the tasks, method(s) and deliverables for the Study;
- d) A preliminary work schedule that identifies work phases (by Gantt Chart or other similar illustration) including key dates for major deliverables (discussion papers, final public consultation strategy, management of comments, public consultation including open houses and statutory public meetings, and draft and final By-laws) in the proposed detailed work plan;
- e) Detailed project budget showing proposed staffing roles, number of hours per task per person dedicated to this project, and hourly rate per person;
- f) State the assumptions regarding the roles and involvement of City staff;
- g) Identification of “value-added” services brought by the Project Team; and
- h) A description of the quality control methods that will be employed throughout the work phases.

Project Leader, Project Team and Resources = 25 Points

It is important that the work be provided by a Project Team that can demonstrate knowledge of, and experience in providing similar services for projects of comparable nature, size and scope. In particular, the Proponent should provide an overview of the key personnel who would be primarily involved in the project and include the following:

- a) Identify the prime firm submitting the Proposal and the sub-consultant firms (if applicable) that will be assembled to undertake the work for each part of the deliverables;
- b) The name, title, mailing address, phone number and e-mail address of the Project Leader;
- c) Condensed resumes and professional credentials of each individual on the Project Team that highlights their education, training, and work history;
- d) The respective roles of the team members and their current office locations. Proponent’s Project Team members named in this RFP cannot be replaced without prior written approval from the City;
- e) Current and future project list that will be undertaken by members of the Project Team including their current workload (i.e., identify other competing priorities that are assigned to each member within this project timeline); and
- f) Organizational chart that clearly defines the chain of command for each individual with the Project Team.

Quality of References = Pass/Fail

Relevance of projects similar in scope and value completed over the last five (5) years. Complete Appendix E – Reference Form (or supply on other paper stock) and submit with the proposal.

The City will contact the references provided as part of its evaluation process.

Pricing = 15 Points

Proponents should review, complete and submit Appendix C, Pricing Form.

Presentation and Questions = 25 Points (if required)

Up to a maximum of three of the top-ranked Proponents may be selected to present an overview of their Proposal to the City followed by a question period at a mutually agreeable date/time at City of Pickering, City Hall.

The presentation should address a brief overview of the proponents RFP submission, highlighting community engagement techniques, describing the approach to Phase One discussion papers, overview of Gantt chart, and any value-added services available.

The City reserves the right to ask follow-up questions regarding a Proponent's RFP submission or presentation.



Memo

To: Kyle Bentley
Director, City Development

November 19, 2019

From: Lisa Chang
Buyer, Supply & Services

Copy: Administrative Assistant, City Development
Planner II
Principal Planner, Development Review
Manager, Development Review and Urban Design
Manager, Supply & Services

Subject: Proposal No. RFP-7-2019
Comprehensive Zoning By-Law Review
Closing Date: Wednesday, November 6, 2019
- File: F-5300-001

Further to memo dated November 7, 2019, two proposals proceeded to Stage II evaluation.

The Evaluation Committee, consisting of City Staff from City Development, conducted independent evaluations of the proposals. A summary of average scores is completed and a copy is attached.

In accordance with Item 2.7 Stage VI – Ranking and Contract Negotiations, all scores from Stage II and Stage III have been added together, the proponents have been ranked based on their total scores, and may be selected to enter into contract negotiations. The Evaluation Committee has deemed that a Presentation with Meridian Planning Consultants is not necessary given the scoring difference during Stages II and III.

WSP Canada Group Ltd. is the highest ranking proponent in the amount of \$364,945.00 plus HST for all three phases of the work.

A budget of \$100,000.00 was provided to Supply & Services for the first phase of this procurement. For future phases, budget will have to be requested and approved prior to awarding the contract extension. If the recommendation to award exceeds the budgeted amount, refer to Financial Control Policy Item 11 for additional instructions.

In accordance with Purchasing Policy Item 06.04, the authority for the dollar limit as set out below excludes HST.

As such, in accordance with Purchasing Policy Item 10.04 (c), where written proposals are obtained by the Manager in accordance with procedures set out in Section 06 and funds are available in the approved budget:

(c) An award over \$50,000 is subject to the additional approval of Council.

Please include the following items in your Report to Council:

1. if Item (c) is acceptable to the Manager, Budgets & Internal Audit;
2. any past work experience with the highest ranking proponent **WSP Canada Group Ltd.** including work location;
3. the appropriate account number(s) to which this work is to be charged;
4. the budget amount(s) assigned thereto;
5. Treasurer's confirmation of funding;
6. related departmental approvals; and
7. related comments specific to the project.

Upon receiving Council's approval, an approved requisition will be required to proceed.

Do not disclose any information to enquiries during this time. The Proponents will be advised of the outcome in due course.

If you require further information, please feel free to contact me or a member of Supply & Services.

LC
Attachments (3)